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AUTHOR Clancey, William J.
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ABSTRACT

The concept of a qualitative model provides a unifying perspective for understanding how expert systems differ from conventional programs. Knowledge bases contain qualitative models of systems in the world, that is, primarily non-numeric descriptions that provide a basis for explaining and predicting behavior and formulating action plans. The prevalent view that a quantitative model must be a simulation, to the exclusion of prototypic and behavioral descriptions, has fragmented our field, so that we have failed to usefully synthesize what we have learned about modeling processes. For example, our ideas about "scoring functions" and "casual network traversal," developed apart from a modeling perspective, have obscured the inherent explanatory nature of diagnosis. While knowledge engineering has greatly benefited from the study of human experts as a means of informing model construction, overemphasis on modeling the expert's knowledge had detracted from the primary objective of modeling a system in the world. Placing artificial intelligence squarely in the evolutionary line of teleologic and topologic modeling, this paper argues that the study of network representations has established a foundation for a science and engineering of qualitative models. Four figures and 84 references are provided. (Author/EW)

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Viewing Knowledge Bases as Qualititative Models

by

William J. Clancey

Department of Computer Science

Stanford University
Stanford, CA 94305

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by

William J. Clancey

Stanford Knowledge Systems Laboratory
Department of Computer Science
701 Welch Road, Building C
Palo Alto, CA 94304

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1. Introduction

With the growing interest in expert systems in academia and industry, one question recurs that never seems to receive a satisfying answer: How are expert systems different from conventional programs? Different perspectives suggest different answers. In terms of programming language, expert systems are programs written in "logic," "rules," or "frames" (Friedland, 1985). From the perspective of new computational capabilities, expert systems are programs that can explain their reasoning (Davis, 1986). Or considering how these programs are used, expert systems are consultants, monitors, designers, etc. (Hayes-Roth, et al., 1983). But these perspectives are not completely satisfying because they fail to explain how conventional programs are inherently different: Aren't Fortran conditional statements "rules"? Why is it difficult to write a Fortran program that can explain its reasoning? Why isn't a Bayesian diagnostic program an expert system?

An alternative point of view, which this paper develops, considers the nature of the knowledge encoded in these programs. Expert systems deal with heuristics, uncertain knowledge (Feigenbaum, 1977). Their reasoning is qualitative, not in terms of precise measures. But in the AI literature, the term "qualitative reasoning," characterizing an important and growing subarea of research, has been almost exclusively applied to programs with some kind of *simulation model* of a physical system, such as an electronic circuit (Bobrow, 1984, Chandrasekaran and Milne, 1985). This common definition of qualitative reasoning excludes the majority of expert systems, and, as this paper argues, it is largely responsible for the gap in our understanding.

What is an expert system? A simple answer can be given, one that is half-known and has been half-stated by many people: Expert systems contain qualitative models of the world, in contrast with quantitative models, which involve mathematical laws, such as in physics, electronics, and economics (Padulo and Arbib, 1974). The idea is half-stated in the common view that AI is concerned with *symbolic programming* (Harmon and King, 1985), but this is not a satisfying distinction because numbers are symbols, too. An alternative description, "non-numeric programming," avoids this ambiguity and is also widely used. However, the emphasis on "programming" has distracted us; the idea that these programs contain *non-numeric models* has been generally ignored. Describing AI as "non-numeric science and engineering" is more to the point: *Artificial Intelligence is the study of computational techniques for acquiring, representing, and using qualitative models of physical, perceptual, cognitive, and social systems.*

The purpose of this paper is to give this definition force by enriching our understanding of what qualitative models are. Briefly, a qualitative model describes some system in the world in terms of causal, compositional, or subtype relations among objects and events. One of the most important ideas of this paper is that there is a well-established repertoire of methods for representing qualitative models—networks based on the idea of prototype subsumption, state-

transition, and structural and procedural composition. By studying and using these network representations, AI has established a foundation for a science and engineering of qualitative models.

From early on, we have followed the approach of decomposing knowledge from how it is used, abstracting knowledge structures and reasoning procedures, and formulating an increasingly more general understanding of what knowledge engineering and knowledge bases are all about (Swartout, 1981, Clancey, 1983a, Clancey, 1983b, McDermott, 1983, Szolovits, 1985, Clancey, 1985, Smith, 1985). It is now apparent that knowledge bases contain *models of systems* in the world. Reasoning involves *sequences of tasks*, such as "monitoring" and "diagnosis," by which an understanding or model of specific situations is related to action plans (Section 3). Programs use a simple *repertoire of qualitative modeling techniques*, commonly called "knowledge representations" (Section 4). The idea of a *situation-specific model* makes concrete what programs know and how problem solving can be described in terms of model-manipulation operators (Section 5). Finally, an historical perspective shows how AI's concern with adaptiveness and rationality of the autonomous agent emphasizes the *role* of a model as what a problem solver knows (hence, "knowledge base") (Section 6). This has been to the detriment of understanding the primary characteristic of knowledge in terms of *models* that partition the world, viewing it selectively and making it coherent for some purpose.

2. The need for a synthesis

Given the generality of the term "model" and the all-encompassing nature of this paper, it is worthwhile addressing a few possible objections up front.

First, we tend to adopt an idealized view of what a model is. Observing how impoverished our programs are, we tend to say that they are not models or, at least, "not real models." This critical point of view is valuable for carrying our research forward, but it creates a distinction that only confuses what we are doing and have accomplished. This paper argues that knowledge base structures are models because they describe what is happening in the world and provide a basis for action, that is they *function* as models.

Second, when a number of pieces are brought together, it may look like the picture was always obvious. For example, recalling the idea of a "frame" (Minsky, 1975)—a prototypic description providing a basis for explaining what happens in the world, making predictions, and taking action—it may seem obvious that frames are a kind of qualitative model. *But why don't we teach it this way?* Our understanding of our field is fragmented and inconsistent. Consider:

- Classification and causal network descriptions are commonly used for modeling physical processes (Lehnert, 1978, Weiss, et al., 1978, Szolovits, 1985), but this work is not integrated in the collection, "Qualitative Reasoning about Physical Systems"

(Bobrow, 1984).

- When we refer to a knowledge base as an "expert model" or "consultation model" (Weiss, 1979), we tend to forget that it contains models of systems in the world. By separating out the system descriptions in a knowledge base, we can begin to identify particular kinds of network structures as *different ways of modeling processes* (Section 4).

- In most medical expert systems, a diagnosis is taken to be the *name* of a disease rather than a coherent description of what is happening in the world—a model—that causally relates states and processes. Perhaps because the programs do not structurally simulate pathophysiological processes, researchers have not thought about inference in terms of model construction (Section 5).

- Instructional research has emphasized that people generally have *some* model of how a system works or what procedure to follow for solving a problem, sometimes buggy and incomplete (Gentner and Stevens, 1983). From this, we might expect that expert system explanations would relate the program's model to the user's, perhaps focusing on violated expectations. Instead, we describe explanation in terms of articulating what the program knows and what it did (Davis, 1976, Swartout, 1981, Hasling, et al., 1984). By definition, the program has something the user does not have, "expertise." Thus, we think in terms of "transferring the expertise" (Davis, 1976, Clancey, 1979), rather than *relating alternative models*.

Similarly, the familiar line that AI is "constructing computer programs which exhibit behavior we call 'intelligent behavior' when we observe it in human beings" (Feigenbaum and Feldman, 1963) has provided a useful focus, but leaves out the modeling methodology upon which our work is based.

3. The inference structure of expert systems

Expert systems contain descriptions of system behavior and design, which are *models*, in the usual sense of selective abstractions that allow explanation and/or prediction of events in the world. The knowledge encoded in expert systems *functions* as a model, regardless of what representational form it takes. In this section we describe *what expert systems do* in terms of generic tasks for analyzing and synthesizing systems. The next section lays out a spectrum of representational methods.

All expert systems make assertions about what is true in the world or what actions might be taken: The patient has a fever, the infection might be meningitis, penicillin is a possible therapy, etc. If we lay out how assertions are related as chains of inference, we observe

regularities. A kind of secondary structure emerges. One such structure, termed "heuristic classification," involves systematic abstraction, association between class hierarchies, and refinement (Clancey, 1985). The inference process, that is, the order in which inferences are made, is of course important, but it is a different issue.

Heuristic classification is a problem-solving method by which solutions are selected from a set of pre-enumerated alternatives. The question naturally arises, for what kinds of problems is heuristic classification useful? One approach is to consider what kinds of things might be selected from a list of pre-enumerated alternatives. Examples include: user models, items in a catalog, diagnoses, skeletal plans, numeric models (Clancey, 1985).

Continuing our attempt to generalize, are there patterns in what data and solutions can be? What kinds of things are classified and heuristically related? We start by laying out common sequences:

Inference Structure	Example Program[1]
patient -> disease -> therapy	MYCIN
reader -> book	GRUNDY
customer -> wine	WINE ADVISOR
structure -> numeric model -> analysis program	SACON
circuit behavior -> fault	SOPHIE
causal reasoning bug -> misconception -> instruction	WHY
program bug -> misconception	MENO

Several generalizations can be made:

1. The "things" being related are *models*, that is, general, abstracted descriptions of specific things in the world. Different terminology—"disease prototype," "user stereotype," "numeric model," "structural abstraction"—has tended to obscure this basic pattern.

2. Models are related in a limited number of ways, by what are called *generic tasks*. We introduce the idea of a *system* and redescribe the things being related in terms of an operation performed to some system at each step (Clancey, 1985):

   ```
   specify -> design -> assemble
   monitor -> diagnose -> modify
   identify -> predict
   monitor -> control
   ```

   For example, "patient -> disease" is replaced by "monitor (detect abnormal body system states and environmental influences) -> diagnose (describe and determine cause of the malfunctioning subsystem's structural and state abnormalities)."

3. We can extend the argument beyond heuristic classification to include all expert

[1] References: MYCIN: (Shortliffe, 1976); GRUNDY: (Rich, 1979); WINE ADVISOR: Teknowledge, Inc.; SACON: (Bennett, 1979); SOPHIE: (Brown, et al., 1982); WHY: (Stevens, et al., 1982); MENO: (Soloway, et al., 1981)

systems. The basis for this is simple: Patterns like "monitor -> diagnose -> repair" are very familiar; we know that they go beyond how diagnoses and repairs are reasoned about. For example, we can return to the pattern of the wine advisor ("specify -> design") and include R1 because it relates a customer's requirements to a VAX system configuration.

We aim for completeness, but of course establishing that these generalizations are true for *every* expert system is a daunting task. We can only consider them to be hypotheses, albeit based on considerable experience, and see if they hold up to further analysis.

In introducing the idea of a "system" as the focus of reasoning, we view tasks not in isolation (as described in (Hayes-Roth, et al., 1983)), but as the range of things that we can do to any given system. On this basis, we can begin to argue about the completeness of the list of tasks. For example, we can reformulate Davis's idea of fault models in these terms. Fault models make explicit "what might have been done to a system" to cause faulty behavior (Davis, 1984):

- Monitor the system and determine how it is different from the intended design: Structure intended to change, such as a gate, may be fixed; components may be functioning wrong or have the wrong structure (e.g., a short).
- The system may have been assembled wrong (e.g., chip flaw).
- The design may be wrong.
- The specification may be wrong.

Davis emphasizes the heuristic value of ordering these considerations. Our system-model orientation suggests that "fault models" can be generalized to all systems and generated from the set of generic tasks. Specifically, we could add "wrong prediction" (observer's expectations were incorrect) and "wrong control" (wrong input for desired output) to Davis's list.

We are now in a position to generalize once again, condensing the four sequences of generic tasks into one sequence (Figure 3-1). In simple terms, we relate desired or observed *system behavior* to a *system description* to some *plan* for taking action in the world or *expectation* about what will happen in the world. Common names for action plans are: "assembly plan," "instructional plan," "therapy plan," and "control plan." The intermediate design or identification might describe a *subsystem*, as in the relation between a patient and his infection. Also, in moving to the third stage, we often are describing a *containing system* that will carry out the assembly, modification, or control process, as in the relation between a client and his vacation plan or a design for a molecular structure and an experiment plan.

Again, this is a description of inference structure, not the order in which inferences are made. For example, specification and design are commonly iterative. In cognitive modeling for instruction, we work backwards from an artifact (say a student's computer program), to an implicit design (the model or plan for the program), to models of the environment in which

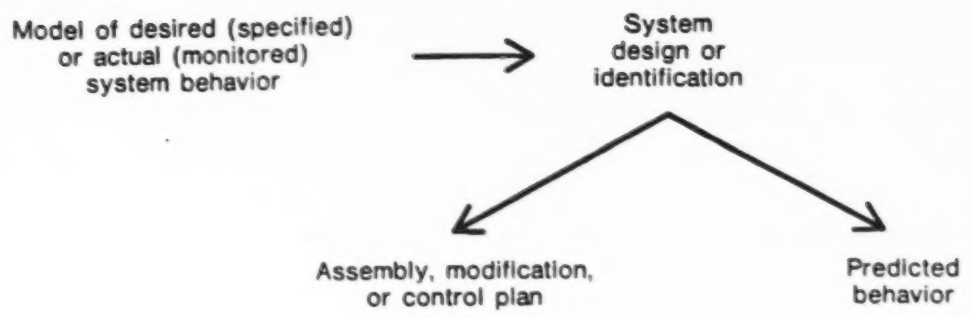

Figure 3-1: General inference structure for reasoning about systems

the artifact is to function (beliefs about what the program is supposed to do) and the components out of which it is made (beliefs about the programming language) (Johnson and Soloway, 1984). Note that for the special case of heuristic classification, system models and action plans are selected from pre-enumerated descriptions.

4. Representation of qualitative models

By relating qualitative methods for modeling systems, we can see our enterprise as a whole. One possible taxonomy distinguishes between the explanatory power of classification and simulation models (Figure 4-1).

Classification models can be used to *recognize* processes, to "account for behavior" of a system, by naming or categorizing the observed pattern (Minsky, 1963). As a phenomenological description, this corresponds, in general terms, to the idea of *frames* (Minsky, 1975), with the temporal nature of processes made explicit in the idea of *scripts* (Schank, 1975, Stevens, et al., 1982) and described more carefully as an "encapsulated history" (Forbus, 1984). A process description identifies a sequence of events that happen over time, spread over several locations (Ackoff, 1974). For example, an infectious process involves intrusion of an organism into the body, movement to a favorable growth site, response by the body, and inflammation. Typically such descriptions are aggregated to reflect general properties and omit sequential details, thus treating the system as an "object" (e.g., descriptions of people as stereotypes (Rich, 1979)). Such descriptions are *models* because they provide an explanatory accounting of what happens in the world and a basis for action (Achinstein, 1983).

Simulation models, broadly construed, provide some description of how the system produces the observed behavior. The model is "runnable," allowing predictions to be made of how a system will change given a set of initial conditions. A *behavioral simulation* describes how a system *appears*, in terms of "hidden states," "observed manifestations," and causal relations among them. A *functional simulation* model places behavior in a larger context, indicating the *role* it plays in achieving the properties of a larger system. For example, a functional model of a radio would refer to amplification and locking on to a broadcast station, while a behavioral model would only describe current flow and changing voltages. Functional models

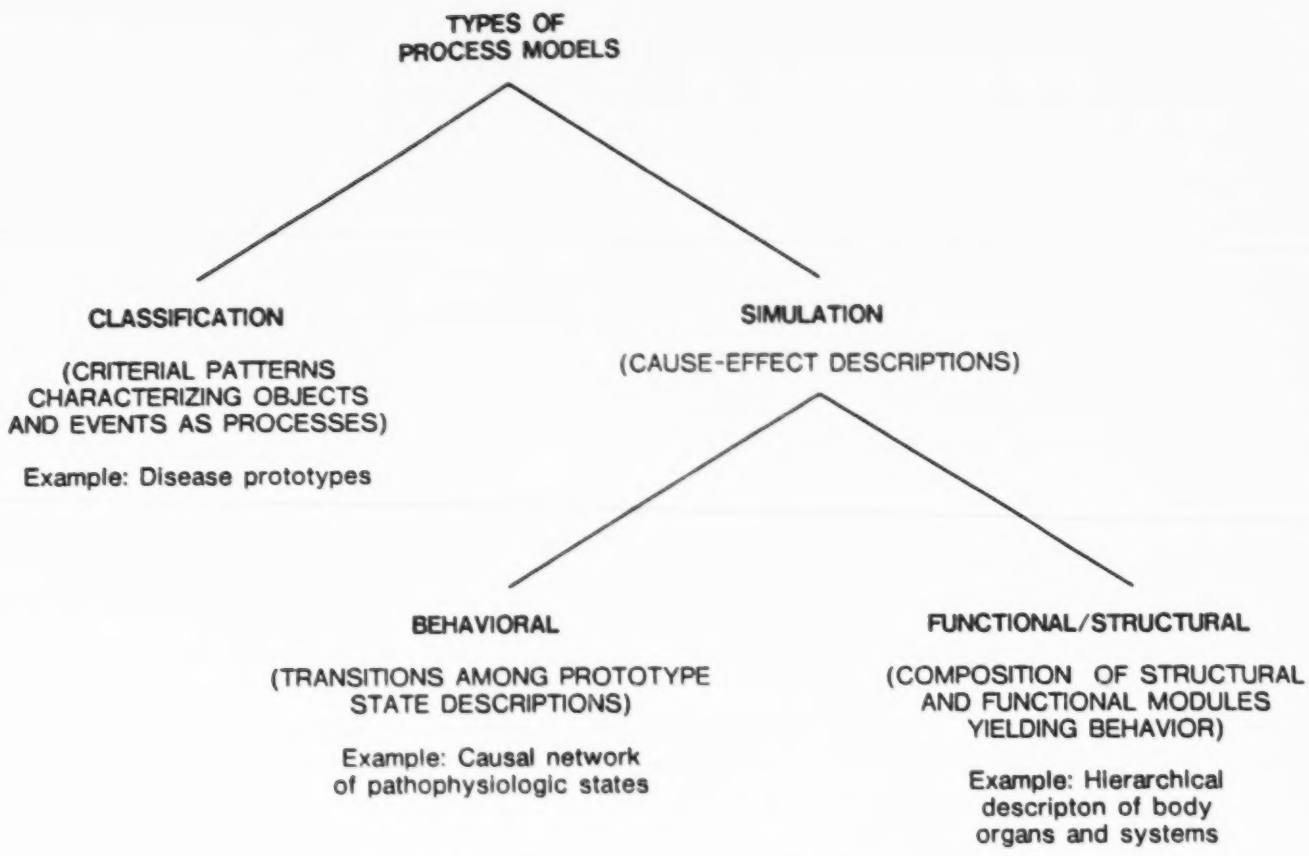

Figure 4-1: Types of qualitative models of processes

account for patterns in behavior and indicate what larger goals these patterns satisfy (Kosslyn, 1980). As an abstraction, a function is something the system can accomplish in multiple ways, depending on its state and the demands of its environment (Ackoff, 1974).

Regarding completeness, classification and behavioral models do not necessarily characterize the full state of the system being reasoned about on any level of analysis, and cannot necessarily predict what state will follow from arbitrary initial conditions (for example, allowing that parts of the system are functioning normally). "Hidden" internal states may be described, but the purpose of transitions and how transitions follow from the structure of the system (the physical components) are not completely described (Weiss, et al., 1978, Szolovits, 1985).

In contrast, a functional model makes a claim about *completeness* of the explanation or system description. The purpose of the system is captured procedurally on multiple levels of abstraction, so states can be related to functional goals. For example, a functional model of diagnosis describes reasoning in terms of general goals for supporting and refining alternative explanations (Patil, 1981, Clancey, 1984), rather than behaviorally, in terms of domain-specific inferences.

Finally, a structure/function model, to which the term "qualitative model" is usually applied in AI research, gives a full accounting for each component in the system in terms of its role in fulfilling the function of the system. Thus, a functional/structural simulation constitutes a strong theory of the design of a system and the mechanism that lies behind observed behavior (De Kleer and Brown, 1984). A model may be functional, without a structural component, as in models of human problem solving, which typically mention brain components in only very general terms (Kosslyn, 1980).

Figure 4-2 summarizes the different perspectives by which qualitative models describe systems: as *processes* (a prototype hierarchy of I/O or cause/effect patterns); *states* (a graph of states linked by cause and subtype); *functions* (procedural modules hierarchically composed by I/O relations); and *structures* (physical components composing functional modules). The next step in the analysis, beyond the scope of this paper, is to relate these alternative models for recognizing a system and understanding its behavior to the demands of generic tasks (Section 3). Notice in particular that the qualitative modeling repertoire is not specific to physical systems; for example, similar techniques are used for modeling the cognitive processes of discourse, diagnosis, and planning.

CONCEPT	RELATION	COMMON NAME	PROGRAM EXAMPLES
I. PROCESS	SUBSUMPTION	PROTOTYPE CLASSIFICATION	(Pauker, 1977) (Lehnert, 1978)
II. STATE	CONDITIONAL TRANSITION (CAUSE)	CAUSAL NETWORK	(Brown, et al.,1973) (Rieger & Grinberg, 1977) (Weiss, et al., 1978)
III. FUNCTION	COMPOSITION	PROCEDURAL NETWORK	(Sacerdoti, 1974) (Brown, et al., 1982) (Clancey, 1984)
IV. STRUCTURE	COMPOSITION	STRUCTURE-FUNCTION MODEL	(de Kleer, 1979) (Genesereth, 1982)

Figure 4-2: Conceptual structure of network representations for systems

This framework can be used as a starting point for understanding the value of multiple representations. For example, it is common for a causal-associational state network to be mapped to a disease process hierarchy (Weiss and Kulikowski, 1984, Szolovits, 1985, Clancey and Letsinger, 1984), thus relating a descriptive view of current system behavior to a developmental accounting. Process descriptions can be combined with a structural simulation for coping with complex or unusual situations (Bylander and Chandrasekaran, 1985, Koton, 1985, Fink, 1985). Qualitative models can be useful for controlling and interpreting quantitative simulations (Brown, 1975, Apte and Weiss, 1985). Finally, note that both

simulation and classification models can be quantitative (Nilsson, 1965), so the classification/simulation and qualitative/quantitative distinctions are orthogonal.

5. Example: Applying the model perspective to diagnosis

A diagnosis explains why observed system behavior is different from expected, generally in terms of a structural variation from the design. Corresponding to the types of qualitative models (Figure 4-1), the diagnostic process takes different forms:

- recognizing a disorder as a set of features;
- constructing an "historical" accounting for behavior (usually partial because only abnormal manifestations are explained, not normal functioning of the system); and
- constructing a "complete" description of the system being diagnosed (accounting for both abnormal and normal system behavior in terms of structural components).

As a model, a medical diagnosis is not just the name of a disease, but a *causal story* that relates the manifestations that need to be explained (because they are abnormal) to the processes that brought them about. Such an argument, shown as an inference network in Figure 5-1, is called a *patient-specific model* (Patil, 1981). In simple terms, it copies over from models of system processes, states, function, and structure the concepts and relations that are believed to hold in this particular problem.

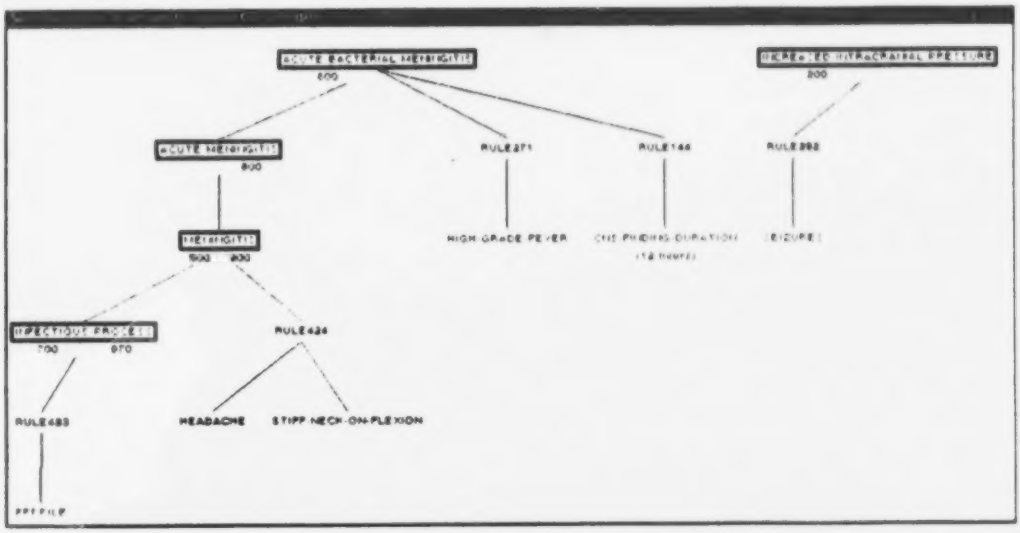

Figure 5-1: Partial diagnostic model in NEOMYCIN

The process of diagnosis can be viewed as the construction of a "proof tree." Proceeding upwards, the explanation becomes more specific in terms of the cause or subtype of the process that is occurring. At some intermediate stage when solving the problem, the network is disconnected and partial (Figure 5-1). The state-transition model indicates that seizures might be caused by increased intracranial pressure; this link is placed in the patient-specific model.

There is evidence for acute meningitis, but the alternative hypotheses have not been related. Is there some underlying cause or process that could account for all of the manifestations? Could meningitis cause increased intracranial pressure? Thus, the problem solver returns to the general model to search for connections that will allow a coherent explanation to be constructed.

While this description of diagnosis has intuitive appeal, most expert systems and their developers never check to see whether all of the findings are covered by the final "diagnosis." Cursory examination of the inference network (as shown for NEOMYCIN in Figure 5-1) reveals surprising gaps in the program's model: Abnormal findings needing to be explained are found to be unrelated to the most likely diagnosis. How can we account for the fact that these gaps go unnoticed?

In part, our language is too loose: The program prints out the *name* of a disorder, and we say, "The program has *made* a diagnosis." We don't think of a diagnosis as a description of a system and how it evolved. Instead, emphasis is on "inferring the right answer." We view inference in terms of adding up belief or finding a linear path of assertions that ends in the right diagnosis.

Accumulating evidence by some scoring function (Pople, 1982) or certainty factor scheme—the predominant approach in expert system diagnosis—disguises the *structural* aspects of diagnosis, that is, how the hypotheses explain the findings. It would be difficult to find a better example of the proverbial groping around the elephant, with each researcher proclaiming a different aspect of the nature of diagnosis:

- In INTERNIST, a scoring function reduces a hypothesis score by the "importance" of the observed findings it fails to explain (Pople, 1982).
- Viewing diagnosis in terms of traversing a network of processes and states, CASNET extracts the longest path from findings to a disease process (Weiss, et al., 1978).
- Reggia defines the best diagnosis as one that satisfies the principle of parsimony, covering the largest set of findings (Reggia, et al., 1984).
- In CADUCEUS, orthogonal relations and the possibility of multiple disorders make linear network traversal combinatorially intractable. Operators piece together state and process descriptions according to subtype and causal relations (Pople, 1982).
- In NEOMYCIN, diagnostic operators focus on, group, refine, and support the *differential*, the most-specific state and process descriptions that explain the findings (Clancey, 1984).
- Finally, in ABEL, these ideas are brought together, so that a diagnosis is a constructed graph that explains the findings on multiple levels of detail (Patil, 1981).

Thus, research has progressed from viewing diagnosis in terms of inferring the name of disease by chains of reasoning (MYCIN), or finding the best match (INTERNIST), to *reasoning about* a constructed inference network, the causal story. Inference is described not in terms of particular evidence rules and backchaining, but in terms of operators for manipulating the

patient-specific model.

An interesting result is that the uncertainty of the diagnosis no longer resides in a numeric score, but in the structure of the model: Alternative hypotheses are ranked by how well they cover the findings (Patil, 1981). Furthermore, by taking into account the *purpose* of the model, the issue becomes not to derive a precise measure of belief, but to determine if the uncertainty needs to be resolved. Medical diagnoses, like all engineering models, are partial. They need only be good enough to discriminate among choices for action, perhaps allowing for monitoring successful completion of a plan and improving an inadequate choice (Petroski, 1985). However, today's programs make a diagnosis independently of how it will be used, or therapeutic distinctions are implicit in the disorder classification. For example, MYCIN does not distinguish among types of viral meningitis because they are treated equivalently. Further development of this point would contrast the engineering demands of diagnosis with *scientific* modeling of systems (as in Dendral (Buchanan, et al., 1969)), which seeks mechanistic detail, and naive device models (Kieras, 1984, Suchman, 1985).

Even if a knowledge base lacks the detailed causal relations that enable reasoning about interactions as in ABEL, the patient-specific model can be useful. First, it can be used as a global perspective for controlling inference. For example, NEOMYCIN's patient-specific model indicates that unnecessary assertions are being made. Several new metarules prevent this, for example (stated negatively for clarity), "If a new disease hypothesis does not explain all abnormal findings, but some existing hypothesis does, then do not add the new hypothesis to the patient-specific model."

Second, as a form of output, the model (Figure 5-1) is a powerful knowledge acquisition tool. It reveals:

- **Gaps in the knowledge base**, evident by a missing link between an abnormal finding an hypothesis (a feature we are exploiting in our teaching program, GUIDON-DEBUG (Clancey, et al., 1986)).
- **Implicit inferences**, evident by the program's inability to link terms such as "headache chronicity" and "cns finding duration" (something we must correct for the program to explain its reasoning).
- **Missing qualitative abstractions**, evident by a direct link between a numeric finding (e.g., "csf protein is 100") and a disease. We must make explicit what ranges are high or low and what is abnormal in order for the program to know what findings need to be explained.
- **Undirected causal links**, where no distinction is made between causes or correlated predispositions and effects (e.g., the patient's age is never an effect of a disease). Again, the program cannot know if its explanation is complete if it doesn't know what facts need to be explained.
- **Side-effects**, evident by links composing a causal relation with a model-manipulation strategy (e.g., if the csf is bloody, rule out bacterial-meningitis). The model perspective disciplines the rule writer to record the correct causal association (bloody csf is caused by a subarachnoid hemorrhage) and to write control rules that reason about alternative explanations (such as the metarule shown above).

These observations do not mean that the classification/behavioral approach should be abandoned in favor of structure-function models. First, diagnosis based on structure-function has generally been restricted to component failures, rather than interactions the system has with its environment. Given the open nature of the world, an "experiential" classification model appears to be practical, and perhaps necessary. Second, regardless of diagnostic value, classification and behavioral descriptions represent what people know in domains such as medicine and everyday reasoning (Rosch, 1978, Feltovich, et al., 1984, Kolodner, 1984). Third, belief maintenance descriptions of inference (e.g., (De Kleer and Brown, 1984)) emphasize model coherence, but do not capture the structural aspects of situation-specific model manipulation, evident in the description of diagnostic tasks as graph-construction operators (Patil, 1981, Pople, 1982, Clancey, 1984). In applying the model perspective to classification and behavioral descriptions, we are not dismissing them as inferior, but rather recognizing their status as models and gaining a measure of quality for diagnostic inference.

Finally, the model-based perspective of Figure 5-1 is compatible with the blackboard paradigm (Hayes-Roth, 1984), viewing reasoning in terms of: A shared database; flexible, opportunistic operators for posting and modifying solution elements; and a separate control structure for scheduling inference. However, the blackboard is not *just* a database. It is a situation-specific model of a system, made apparent by the use of different blackboards or "panels" to separate different systems and action plans. The study of alternative kinds of models (Section 4) and the view of inference as model-manipulation operators is a step towards formalizing principles for structuring a blackboard and describing what "knowledge sources" do. This analysis also suggests that heuristic classification is not adequate for diagnosis and other systems problems when pre-enumerated processes or action plans can occur together and interact.

6. Historical perspective

We can resolve some of the uncertainty about the nature of expert systems and AI in general by relating this work to other science and engineering perspectives, placing it in historical context, and defining it comparatively. This is the chapter that AI textbooks consistently omit. We need to tell students not just what our goals and methodology are, but how we got here and how what we're doing is different from traditional science and engineering.

Today we take for granted that the words "machine" and "intelligence" go together because the idea of a machine today allows for adaptivity (McCorduck, 1979). But this was not always so. For scientists and engineers of the past, a "mechanism" was the antithesis of change and flexibility. It was something fixed, composed of known parts, and fully predictable. The "scientific perspective" in part had its origin in this mechanistic or deterministic conception of nature. Thus, the mysterious concepts of "a superhuman final cause" and "purpose" were rejected, and all observed behavior reduced to separate, discrete parts studied in isolation

(Frank, et al., 1948, Bertalanffy, 1968).

However, in this century, this view was found to be inadequate for understanding complex systems. The concept of goal was re-introduced in cybernetics by models of self-regulation, based on the concept of feedback (Wiener, 1961). Several sciences, including particularly biology and economics, turned to the study of systems not as "constitutive characteristics," of elements in isolation, but as relations among elements (Bertalanffy, 1968). Thus, study turned from invariant properties (such as molecular weight) to properties of a *complex*, dependent on relations among interacting elements (such as *topological structure* of a molecule and the *function* of molecular units).

In modeling the *open* and *non-linear* character of systems, analytic techniques broadened to include concepts such as: "compartmentalization" (near decomposability (Simon, 1969)), topology, adaptiveness, information flow, state-transition, and rationality (Bertalanffy, 1968, Newell and Simon, 1972). In particular, these perspectives address the need to represent discontinuities (non-linearity) in system behavior: "Representation by differential equations is too restricted for a theory to include biological systems and calculating machines where discontinuities are ubiquitous" (Bertalanffy, 1968).

From this perspective, Artificial Intelligence merges the *teleological concepts* of choice, regulation, adaptiveness and rationality with the *modeling concepts* of set, graph, net, and automata theory and formal logic (Newell and Simon, 1972). Furthermore, emphasis has shifted from modeling systems in themselves, to modeling "self-directed personalities" (Frank, et al., 1948) that incorporate a model of the world, goals, and a reasoning process for solving particular problems. The idea of the *autonomous agent* crucially frames our research. To determine what could be the basis for rationality and adaptation, we have focused on the *individual* interacting with the world to solve some problem. In order to *generate* intelligent behavior in an autonomous agent, a program, we put inside a *representation* of the agent's knowledge of the world and his goals. Rather than proving theorems about structures in themselves (as in graph theory), we use them to *represent* concepts and relations. Thus have evolved the well-known representational structures of our field: the augmented-transition network, the procedural network, the causal-association network, the semantic network, and so on.

In this historical context, we see that AI combines a framework for modeling (the idea of the autonomous agent) with qualitative modeling techniques. In describing AI, we have tended to emphasize the idea of generating intelligent behavior, and not made clear how our modeling techniques are different. Rather than numeric *measures*, we have devised methods for *describing* physical and cognitive systems. Our programs describe a system's physical appearance (structure), behavior, goals, and role in a larger context (function). These relations are distinguished in our advanced representation languages (Bobrow, 1984, Brachman and

Levesque, 1985).

In the buzzword "knowledge," we emphasize that what the problem solver knows or believes is central, providing a crucial focus for our research. But the term "knowledge" emphasizes the *role* of a representation, obscuring its primary status as a model of a system in the world. The discussion in Sections 3 and 5 gives examples of how our understanding of inference, uncertainty, and knowledge base design can be improved by applying the systems model perspective.

In general, the idea that knowledge bases, like all models, are selective, based on assumptions, and prone to failure has been given almost no consideration in knowledge engineering research. Perhaps the most basic engineering problem in constructing a model is to determine the range of its applicability. How can we determine what cases—situations in the world—will not be successfully modeled? Just as the structural engineer must ensure that his model of a bridge or building will be adequate for every real world event that occurs (given some assumptions) (Petroski, 1985, Weinberg, 1982), the knowledge engineer must certify the validity of his model. Yet, outside of established domains with a strong theory, such as electronics, no strong statements can be made about the accuracy of expert systems, except perhaps that they will work on the cases they have been tested on. While expert systems may only be designed to work for "typical cases," we must find some way to describe the extremes and articulate procedures for detecting when they occur. Until we shift from continuously blessing our programs with the name of "expert," and realize that they are only models, it is unlikely that the required engineering methodology will develop.

7. Conclusions

Focusing on the function of knowledge bases as models of systems, I have described expert-system problem solving in terms of generic tasks, provided a unifying description of qualitative representations, and related AI to the concerns of traditional science and engineering. Using medical diagnosis as an example, I showed the benefits of this perspective for detecting gaps in a knowledge base and understanding inference in terms of a model-manipulation strategy.

All knowledge bases contain qualitative models. Describing expert systems has been difficult because a "knowledge base" could be almost anything. Now, confronted with a knowledge base, you might ask: What system is it a model of? Whose model is it? Why is it believed? Is it a classification, state-transition, functional, or structural model? Are these composed? What is the inference procedure? Are situation-specific models selected or constructed? What is the explanatory/predictive or system synthesis capability? For what world? For what task? Under what assumptions? How do you know when it isn't good enough?

Along these lines, problem solving, learning, and explanation can be reconceptualized in terms of model acquisition, representation, and use. Many researchers have already adopted

this perspective (for example, see (Weiss, et al., 1978, Gaschnig, 1980, Swartout, 1981, Kahn, et al., 1985, Soo, et al., 1985)). But our work has barely begun in developing this new science and engineering of qualitative models:

We have explored a range of systems of different types: physical, perceptual, cognitive, and social. But the modeling methods are not practically accessible to professionals in other fields.

We now can see that the *locus* of a model can be strikingly varied: mathematical equations, a physical replica, a computer program, and a mental model. But we are struggling to understand what a representation is and how it might be confused with "reality" (Smith, 1982, Smith, 1985, Sloman, 1985).

We have developed qualitative models in expert systems for scientific and engineering applications (Sriram and Rychener, 1986). But we have not developed a methodology for testing models that distinguishes between these goals.

We have qualitative models of systems in the world, second order models (e.g., student models), and discourse and instructional models for communication and modification of models. But we are uncertain about how to represent these explicitly and to what extent they can be separated.

We continue to study the evolution of models, their origin and development in the individual, with recent successes in failure-driven and explanation-based learning (e.g., (Kolodner, 1984, Mitchell, et al., 1985)). But this has underscored how models from different domains and different perspectives interact in learning, in sharp contrast with the sparseness of today's knowledge bases.

We have developed a repertoire of computational methods for representing qualitative models and inference methods. But the relation of these methods to numeric techniques and their psychological aspects remain to be understood (Gentner and Stevens, 1983, Kuipers, 1985, Patel and Groen, 1986, Rouse and Morris, 1985).

Knowledge engineering is not just a new kind of programming. It is a new methodology for constructing models of systems in the world so they can be automatically assembled, modified, and controlled. We are not so much programmers as engineers, scientists, and perhaps philosophers. If we view our work in this way, consistently attempting to unify it from a modeling perspective, our claims and successes will be better understood.

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Personnel Analysis Division,
AF/MPXA
5C360, The Pentagon
Washington, DC 20330

Air Force Human Resources Lab
AFHRL/MPD
Brooks AFB, TX 78235

AFOSR,
Life Sciences Directorate
Bolling Air Force Base
Washington, DC 20332

Dr. Robert Ahlers
Code N711
Human Factors Laboratory
Naval Training Systems Center
Orlando, FL 32813

Dr. Ed Aiken
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. William E. Alley
AFHRL/MOT
Brooks AFB, TX 78235

Dr. Earl A. Alluisi
HQ, AFHRL (AFSC)
Brooks AFB, TX 78235

Dr. John R. Anderson
Department of Psychology
Carnegie-Mellon University
Pittsburgh, PA 15213

Dr. Nancy S. Anderson
Department of Psychology
University of Maryland
College Park, MD 20742

Dr. Steve Andriole
George Mason University
School of Information
Technology & Engineering
4400 University Drive
Fairfax, VA 22030

Dr. John Annett
University of Warwick
Department of Psychology
Coventry CV4 7AJ
ENGLAND

Dr. Phipps Arabie
University of Illinois
Department of Psychology
603 E. Daniel St.
Champaign, IL 61820

Technical Director, ARI
5001 Eisenhower Avenue
Alexandria, VA 22333

Special Assistant for Projec
OASN(M&RA)
5D800, The Pentagon
Washington, DC 20350

Dr. Michael Atwood
ITT - Programming
1000 Oronoque Lane
Stratford, CT 06497

Dr. Patricia Baggett
University of Colorado
Department of Psychology
Box 345
Boulder, CO 80309

Dr. Eva L. Baker
UCLA Center for the Study
of Evaluation
145 Moore Hall
University of California
Los Angeles, CA 90024

Dr. James D. Baker
Director of Automation
Allen Corporation of America
401 Wythe Street
Alexandria, VA 22314

Dr. Meryl S. Baker
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Donald E. Bamber
Code 71
Navy Personnel R & D Center
San Diego, CA 92152-6800

Mr. J. Barber
HQS, Department of the Army
DAPE-ZBR
Washington, DC 20310

Capt. J. Jean Belanger
Training Development Division
Canadian Forces Training System
CFTSHQ, CFB Trenton
Astra, Ontario, KOK
CANADA

CDR Robert J. Biersner, USN
Naval Biodynamics Laboratory
P. O. Box 29407
New Orleans, LA 70189

Dr. Menucha Birenbaum
School of Education
Tel Aviv University
Tel Aviv, Ramat Aviv 69978
ISRAEL

Dr. Werner P. Birke
Personalstammamt der Bundeswehr
Kolner Strasse 262
D-5000 Koeln 90
FEDERAL REPUBLIC OF GERMANY

Dr. Gautam Biswas
Department of Computer Science
University of South Carolina
Columbia, SC 29208

Dr. John Black
College, Columbia Univ.
525 West 121st Street
New York, NY 10027

Dr. Arthur S. Blaiwes
Code N711
Naval Training Systems Center
Orlando, FL 32813

Dr. Robert Blanchard
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Jeff Bonar
Learning R&D Center
University of Pittsburgh
Pittsburgh, PA 15260

Dr. J. C. Boudreaux
Center for Manufacturing
Engineering
National Bureau of Standards
Gaithersburg, MD 20899

Dr. Gordon H. Bower
Department of Psychology
Stanford University
Stanford, CA 94306

Dr. Richard Braby
NTSC Code 10
Orlando, FL 32751

Dr. Robert Breaux
Code N-095R
Naval Training Systems Cente
Orlando, FL 32813

Dr. John S. Brown
XEROX Palo Alto Research
Center
3333 Coyote Road
Palo Alto, CA 94304

Dr. Bruce Buchanan
Computer Science Department
Stanford University
Stanford, CA 94305

Dr. Howard Burrows
National Institute of Health
Bldg. 10, Room 5C-106
Bethesda, MD 20892

Dr. Patricia A. Butler
OERI
555 New Jersey Ave., NW
Washington, DC 20208

Dr. Tom Cafferty
Dept. of Psychology
University of South Carolina
Columbia, SC 29208

Dr. Robert Calfee
School of Education
Stanford University
Stanford, CA 94305

Joanne Capper
Center for Research into Practice
1718 Connecticut Ave., N.W.
Washington, DC 20009

Dr. Jaime Carbonell
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Mr. James W. Carey
Commandant (G-PTE)
U.S. Coast Guard
2100 Second Street, S.W.
Washington, DC 20593

Dr. Susan Carey
Harvard Graduate School of
Education
337 Gutman Library
Appian Way
Cambridge, MA 02138

Dr. Pat Carpenter
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Prof. John W. Carr III
Department of Computer Science
Moore School of
Electrical Engineering
University of Pennsylvania
Philadelphia, PA 19104

Dr. Robert Carroll
OP 01B7
Washington, DC 20370

LCDR Robert Carter
Office of the Chief
of Naval Operations
OP-01B
Pentagon
Washington, DC 20350-2000

Dr. Fred Chang
Navy Personnel R&D Center
Code 51
San Diego, CA 92152-6800

Dr. Alphonse Chapanis
8415 Bellona Lane
Suite 210
Buxton Towers
Baltimore, MD 21204

Dr. Davida Charney
Department of Psychology
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Dr. Eugene Charniak
Brown University
Computer Science Department
Providence, RI 02912

Dr. Paul R. Chatelier
OUSDRE
Pentagon
Washington, DC 20350-2000

Dr. Michelene Chi
Learning R & D Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15213

Mr. Raymond E. Christal
AFHRL/MOE
Brooks AFB, TX 78235

Dr. Yee-Yeen Chu
Perceptronics, Inc.
21111 Erwin Street
Woodland Hills, CA 91367-371

Dr. William Clancey
Stanford University
Knowledge Systems Laboratory
701 Welch Road, Bldg. C
Palo Alto, CA 94304

Chief of Naval Education
and Training
Liaison Office
Air Force Human Resource Lab
Operations Training Division
Williams AFB, AZ 85224

Assistant Chief of Staff
for Research, Development,
Test, and Evaluation
Naval Education and
Training Command (N-5)
NAS Pensacola, FL 32508

Dr. Allan M. Collins
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. John J. Collins
Director, Field Research
Office, Orlando
NPRDC Liaison Officer
NTSC Orlando, FL 32813

Dr. Stanley Collyer
Office of Naval Technology
Code 222
800 N. Quincy Street
Arlington, VA 22217-5000

Dr. Lynn A. Cooper
Learning R&D Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15213

Dr. Meredith P. Crawford
American Psychological Association
Office of Educational Affairs
1200 17th Street, N.W.
Washington, DC 20036

Dr. Hans Crombag
University of Leyden
Education Research Center
Boerhaavelaan 2
2334 EN Leyden
The NETHERLANDS

LT Judy Crookshanks
Chief of Naval Operations
OP-112G5
Washington, DC 20370-2000

Dr. Kenneth B. Cross
Anacapa Sciences, Inc.
P.O. Drawer Q
Santa Barbara, CA 93102

Dr. Mary Cross
Department of Education
Adult Literacy Initiative
Room 4145
400 Maryland Avenue, SW
Washington, DC 20202

CTB/McGraw-Hill Library
2500 Garden Road
Monterey, CA 93940

CAPT P. Michael Curran
Office of Naval Research
800 N. Quincy St.
Code 125
Arlington, VA 22217-5000

Dr. Cary Czichon
Intelligent Instructional Sy
Texas Instruments AI Lab
P.O. Box 660245
Dallas, TX 75266

Bryan Dallman
AFHRL/LRT
Lowry AFB, CO 80230

LT John Deaton
ONR Code 125
800 N. Quincy Street
Arlington, VA 22217-5000

Dr. Natalie Dehn
Department of Computer and
Information Science
University of Oregon
Eugene, OR 97403

Dr. Gerald F. DeJong
Artificial Intelligence Grou
Coordinated Science Laborato
University of Illinois
Urbana, IL 61801

Goery Delacote
Directeur de L'informatique
Scientifique et Technique
CNRS
15, Quai Anatole France
75700 Paris FRANCE

Mr. Robert Denton
AFMPC/MPCYPR
Randolph AFB, TX 78150

Mr. Paul DiRenzo
Commandant of the Marine Corps
Code LBC-4
Washington, DC 20380

Dr. R. K. Dismukes
Associate Director for Life Sciences
AFOSR
Bolling AFB
Washington, DC 20332

Defense Technical
Information Center
Cameron Station, Bldg 5
Alexandria, VA 22314
Attn: TC
(12 Copies)

Dr. Thomas M. Duffy
Communications Design Center
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Barbara Eason
Military Educator's
Resource Network
InterAmerica Research Associates
1555 Wilson Blvd
Arlington, VA 22209

Edward E. Eddowes
CNATRA N301
Naval Air Station
Corpus Christi, TX 78419

Dr. John Ellis
Navy Personnel R&D Center
San Diego, CA 92252

Dr. Richard Elster
Deputy Assistant Secretary
of the Navy (Manpower)
OASN (M&RA)
Department of the Navy
Washington, DC 20350-1000

Dr. Susan Embretson
University of Kansas
Psychology Department
426 Fraser
Lawrence, KS 66045

Dr. Randy Engle
Department of Psychology
University of South Carolina
Columbia, SC 29208

Lt. Col Rich Entlich
HQ, Department of the Army
OCSA(DACS-DPM)
Washington, DC 20310

Dr. Susan Epstein
Hunter College
144 S. Mountain Avenue
Montclair, NJ 07042

Dr. William Epstein
University of Wisconsin
W. J. Brogden Psychology Bld
1202 W. Johnson Street
Madison, WI 53706

ERIC Facility-Acquisitions
4833 Rugby Avenue
Bethesda, MD 20014

Dr. K. Anders Ericsson
University of Colorado
Department of Psychology
Boulder, CO 80309

Dr. Edward Esty
Department of Education, OER
Room 717D
1200 19th St., NW
Washington, DC 20208

Dr. Beatrice J. Farr
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Marshall J. Farr
2520 North Vernon Street
Arlington, VA 22207

Dr. Pat Federico
Code 511
NPRDC
San Diego, CA 92152-6800

Dr. Jerome A. Feldman
University of Rochester
Computer Science Department
Rochester, NY 14627

Dr. Paul Feltovich
Southern Illinois University
School of Medicine
Medical Education Department
P.O. Box 3926
Springfield, IL 62708

Mr. Wallace Feurzeig
Educational Technology
Bolt Beranek & Newman
10 Moulton St.
Cambridge, MA 02238

Dr. Craig I. Fields
ARPA
1400 Wilson Blvd.
Arlington, VA 22209

Dr. Gerhard Fischer
University of Colorado
Department of Computer Science
Boulder, CO 80309

J. D. Fletcher
9931 Corsica Street
Vienna VA 22180

Dr. Linda Flower
Carnegie-Mellon University
Department of English
Pittsburgh, PA 15213

Dr. Kenneth D. Forbus
University of Illinois
Department of Computer Science
1304 West Springfield Avenue
Urbana, IL 61801

Dr. Barbara A. Fox
University of Colorado
Department of Linguistics
Boulder, CO 80309

Dr. Carl H. Frederiksen
McGill University
3700 McTavish Street
Montreal, Quebec H3A 1Y2
CANADA

Dr. John R. Frederiksen
Bolt Beranek & Newman
50 Moulton Street
Cambridge, MA 02138

Dr. Norman Frederiksen
Educational Testing Service
Princeton, NJ 08541

Dr. Alfred R. Fregly
AFOSR/NL
Bolling AFB, DC 20332

Dr. Bob Frey
Commandant (G-P-1/2)
USCG HQ
Washington, DC 20593

Dr. Alinda Friedman
Department of Psychology
University of Alberta
Edmonton, Alberta
CANADA T6G 2E9

Julie A. Gadsden
Information Technology
Applications Division
Admiralty Research Establish
Portsdown, Portsmouth PO6 4A
UNITED KINGDOM

Dr. R. Edward Geiselman
Department of Psychology
University of California
Los Angeles, CA 90024

Dr. Michael Genesereth
Stanford University
Computer Science Department
Stanford, CA 94305

Dr. Dedre Gentner
University of Illinois
Department of Psychology
603 E. Daniel St.
Champaign, IL 61820

Dr. Robert Glaser
Learning Research
& Development Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Arthur M. Glenberg
University of Wisconsin
W. J. Brogden Psychology Bldg.
1202 W. Johnson Street
Madison, WI 53706

Dr. Marvin D. Glock
13 Stone Hall
Cornell University
Ithaca, NY 14853

Dr. Gene L. Gloye
Office of Naval Research
Detachment
1030 E. Green Street
Pasadena, CA 91106-2485

Dr. Sam Glucksberg
Department of Psychology
Princeton University
Princeton, NJ 08540

Dr. Joseph Goguen
Computer Science Laboratory
SRI International
333 Ravenswood Avenue
Menlo Park, CA 94025

Dr. Sherrie Gott
AFHRL/MODJ
Brooks AFB, TX 78235

Jordan Grafman, Ph.D.
2021 Lyttonsville Road
Silver Spring, MD 20910

Dr. Richard H. Granger
Department of Computer Science
University of California, Irvine
Irvine, CA 92717

Dr. Wayne Gray
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. James G. Greeno
University of California
Berkeley, CA 94720

H. William Greenup
Education Advisor (E031)
Education Center, MCDEC
Quantico, VA 22134

Dipl. Pad. Michael W. Habon
Universitat Dusseldorf
Erziehungswissenschaftliches
Universitatsstr. 1
D-4000 Dusseldorf 1
WEST GERMANY

Prof. Edward Haertel
School of Education
Stanford University
Stanford, CA 94305

Dr. Henry M. Halff
Halff Resources, Inc.
4918 33rd Road, North
Arlington, VA 22207

Dr. Ronald K. Hambleton
Prof. of Education & Psychol
University of Massachusetts
at Amherst
Hills House
Amherst, MA 01003

Dr. Cheryl Hamel
NTSC
Orlando, FL 32813

Dr. Bruce W. Hamill
Johns Hopkins University
Applied Physics Laboratory
Johns Hopkins Road
Laurel, MD 20707

Dr. Ray Hannapel
Scientific and Engineering
Personnel and Education
National Science Foundation
Washington, DC 20550

Stevan Harnad
Editor, The Behavioral and
Brain Sciences
20 Nassau Street, Suite 240
Princeton, NJ 08540

Mr. William Hartung
PEAM Product Manager
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Wayne Harvey
SRI International
333 Ravenswood Ave.
Room B-S324
Menlo Park, CA 94025

Dr. Reid Hastie
Northwestern University
Department of Psychology
Evanston, IL 60201

Prof. John R. Hayes
Carnegie-Mellon University
Department of Psychology
Schenley Park
Pittsburgh, PA 15213

Dr. Barbara Hayes-Roth
Department of Computer Science
Stanford University
Stanford, CA 95305

Dr. Frederick Hayes-Roth
Teknowledge
525 University Ave.
Palo Alto, CA 94301

Dr. Joan I. Heller
505 Haddon Road
Oakland, CA 94606

Dr. James Hendler
Dept. of Computer Science
University of Maryland
College Park, MD 20742

Dr. Jim Hollan
Intelligent Systems Group
Institute for
Cognitive Science (C-015)
UCSD
La Jolla, CA 92093

Dr. Melissa Holland
Army Research Institute for
Behavioral and Social Sci
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Robert W. Holt
Department of Psychology
George Mason University
4400 University Drive
Fairfax, VA 22030

Dr. Keith Holyoak
University of Michigan
Human Performance Center
330 Packard Road
Ann Arbor, MI 48109

Prof. Lutz F. Hornke
Institut fur Psychologie
RWTH Aachen
Jaegerstrasse 17/19
D-5100 Aachen
WEST GERMANY

Mr. Dick Hoshaw
OP-135
Arlington Annex
Room 2834
Washington, DC 20350

Dr. James Howard
Dept. of Psychology
Human Performance Laboratory
Catholic University of
America
Washington, DC 20064

Dr. Steven Hunka
Department of Education
University of Alberta
Edmonton, Alberta
CANADA

Dr. Earl Hunt
Department of Psychology
University of Washington
Seattle, WA 98105

Dr. Ed Hutchins
Intelligent Systems Group
Institute for
Cognitive Science (C-015)
UCSD
La Jolla, CA 92093

Dr. Dillon Inouye
WICAT Education Institute
Provo, UT 84057

Dr. Alice Isen
Department of Psychology
University of Maryland
Catonsville, MD 21228

Dr. Zachary Jacobson
Bureau of Management Consulting
365 Laurier Avenue West
Ottawa, Ontario K1A 0S5
CANADA

Dr. Robert Jannarone
Department of Psychology
University of South Carolina
Columbia, SC 29208

Dr. Claude Janvier
Directeur, CIRADE
Universite' du Quebec a Montreal
Montreal, Quebec H3C 3P8
CANADA

COL Dennis W. Jarvi
Commander
AFHRL
Brooks AFB, TX 78235-5601

Dr. Robin Jeffries
Hewlett-Packard Laboratories
P.O. Box 10490
Palo Alto, CA 94303-0971

Dr. Robert Jernigan
Decision Resource Systems
5595 Vantage Point Road
Columbia, MD 21044

Margaret Jerome
c/o Dr. Peter Chandler
83, The Drive
Hove
Sussex
UNITED KINGDOM

Dr. Joseph E. Johnson
Assistant Dean for
Graduate Studies
College of Science and Mathe
University of South Carolina
Columbia, SC 29208

Dr. Richard Johnson
Boise State University
Simplot/Micron
Technology Center
Boise, ID 83725

CDR Tom Jones
ONR Code 125
800 N. Quincy Street
Arlington, VA 22217-5000

Dr. Douglas A. Jones
P.O. Box 6640
Lawrenceville
NJ 08648

Col. Dominique Jouslin de No
Etat-Major de l'Armee de Ter
Centre de Relations Humaines
3 Avenue Octave Greard
75007 Paris
FRANCE

Dr. Marcel Just
Carnegie-Mellon University
Department of Psychology
Schenley Park
Pittsburgh, PA 15213

Dr. Milton S. Katz
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Scott Kelso
Haskins Laboratories,
270 Crown Street
New Haven, CT 06510

Dr. Dennis Kibler
University of California
Department of Information
and Computer Science
Irvine, CA 92717

Dr. David Kieras
University of Michigan
Technical Communication
College of Engineering
1223 E. Engineering Building
Ann Arbor, MI 48109

Dr. Peter Kincaid
Training Analysis
& Evaluation Group
Department of the Navy
Orlando, FL 32813

Dr. Walter Kintsch
Department of Psychology
University of Colorado
Campus Box 345
Boulder, CO 80302

Dr. Paula Kirk
Oakridge Associated Universities
University Programs Division
P.O. Box 117
Oakridge, TN 37831-0117

Dr. David Klahr
Carnegie-Mellon University
Department of Psychology
Schenley Park
Pittsburgh, PA 15213

Dr. Mazie Knerr
Program Manager
Training Research Division
HumRRO
1100 S. Washington
Alexandria, VA 22314

Dr. Janet L. Kolodner
Georgia Institute of Technology
School of Information
& Computer Science
Atlanta, GA 30332

Dr. Stephen Kosslyn
Harvard University
1236 William James Hall
33 Kirkland St.
Cambridge, MA 02138

Dr. Kenneth Kotovsky
Department of Psychology
Community College of
Allegheny County
800 Allegheny Avenue
Pittsburgh, PA 15233

Dr. David H. Krantz
2 Washington Square Village
Apt. # 15J
New York, NY 10012

Dr. Benjamin Kuipers
University of Texas at Austi
Department of Computer Scien
T.S. Painter Hall 3.28
Austin, Texas 78712

Dr. David R. Lambert
Naval Ocean Systems Center
Code 441T
271 Catalina Boulevard
San Diego, CA 92152-6800

Dr. Pat Langley
University of California
Department of Information
and Computer Science
Irvine, CA 92717

M. Diane Langston
Communications Design Center
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Dr. Jill Larkin
Carnegie-Mellon University
Department of Psychology
Pittsburgh, PA 15213

Dr. Robert Lawler
Information Sciences, FRL
GTE Laboratories, Inc.
40 Sylvan Road
Waltham, MA 02254

Dr. Paul E. Lehner
PAR Technology Corp.
7926 Jones Branch Drive
Suite 170
McLean, VA 22102

Dr. Alan M. Lesgold
Learning R&D Center
University of Pittsburgh
Pittsburgh, PA 15260

Dr. Alan Leshner
Deputy Division Director
Behavioral and Neural Sciences
National Science Foundation
1800 G Street
Washington, DC 20550

Dr. Jim Levin
University of California
Laboratory for Comparative
Human Cognition
D003A
La Jolla, CA 92093

Dr. John Levine
Learning R&D Center
University of Pittsburgh
Pittsburgh, PA 15260

Dr. Michael Levine
Educational Psychology
210 Education Bldg.
University of Illinois
Champaign, IL 61801

Dr. Charles Lewis
Faculteit Sociale Wetenschappen
Rijksuniversiteit Groningen
Oude Boteringestraat 23
9712GC Groningen
The NETHERLANDS

Dr. Clayton Lewis
University of Colorado
Department of Computer Science
Campus Box 430
Boulder, CO 80309

Library
Naval War College
Newport, RI 02940

Library
Naval Training Systems Cente
Orlando, FL 32813

Dr. Charlotte Linde
SRI International
333 Ravenswood Avenue
Menlo Park, CA 94025

Dr. Marcia C. Linn
Lawrence Hall of Science
University of California
Berkeley, CA 94720

Dr. Robert Linn
College of Education
University of Illinois
Urbana, IL 61801

Dr. Don Lyon
P. O. Box 44
Higley, AZ 85236

Dr. Jane Malin
Mail Code SR 111
NASA Johnson Space Center
Houston, TX 77058

Dr. William L. Maloy
Chief of Naval Education
and Training
Naval Air Station
Pensacola, FL 32508

Dr. Sandra P. Marshall
Dept. of Psychology
San Diego State University
San Diego, CA 92182

Dr. Manton M. Matthews
Department of Computer Scien
University of South Carolina
Columbia, SC 29208

Dr. Richard E. Mayer
Department of Psychology
University of California
Santa Barbara, CA 93106

Dr. James McBride
Psychological Corporation
c/o Harcourt, Brace,
Javanovich Inc.
1250 West 6th Street
San Diego, CA 92101

Dr. David J. McGuinness
Gallaudet College
800 Florida Avenue, N.E.
Washington, DC 20002

Dr. Kathleen McKeown
Columbia University
Department of Computer Science
New York, NY 10027

Dr. Joe McLachlan
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. James McMichael
Assistant for MPT Research,
Development, and Studies
OP 01B7
Washington, DC 20370

Dr. Barbara Means
Human Resources
Research Organization
1100 South Washington
Alexandria, VA 22314

Dr. Douglas L. Medin
Department of Psychology
University of Illinois
603 E. Daniel Street
Champaign, IL 61820

Dr. Arthur Melmed
U. S. Department of Education
724 Brown
Washington, DC 20208

Dr. Jose Mestre
Department of Physics
Hasbrouck Laboratory
University of Massachusetts
Amherst, MA 01003

Dr. Al Meyrowitz
Office of Naval Research
Code 1133
800 N. Quincy
Arlington, VA 22217-5000

Dr. Ryszard S. Michalski
University of Illinois
Department of Computer Scien
1304 West Springfield Avenue
Urbana, IL 61801

Prof. D. Michie
The Turing Institute
36 North Hanover Street
Glasgow G1 2AD, Scotland
UNITED KINGDOM

Dr. George A. Miller
Department of Psychology
Green Hall
Princeton University
Princeton, NJ 08540

Dr. James R. Miller
MCC
9430 Research Blvd.
Echelon Building #1, Suite 2
Austin, TX 78759

Dr. Mark Miller
Computer*Thought Corporation
1721 West Plano Parkway
Plano, TX 75075

Dr. Andrew R. Molnar
Scientific and Engineering
Personnel and Education
National Science Foundation
Washington, DC 20550

Dr. William Montague
NPRDC Code 13
San Diego, CA 92152-6800

Dr. Tom Moran
Xerox PARC
3333 Coyote Hill Road
Palo Alto, CA 94304

Dr. Melvyn Moy
Navy Personnel R & D Center
San Diego, CA 92152-6800

Dr. Allen Munro
Behavioral Technology
Laboratories - USC
1845 S. Elena Ave., 4th Floor
Redondo Beach, CA 90277

Director,
Decision Support
Systems Division, NMPC
Naval Military Personnel Command
N-164
Washington, DC 20370

Director,
Distribution Department, NMPC
N-4
Washington, DC 20370

Director,
Overseas Duty Support
Program, NMPC
N-62
Washington, DC 20370

Head, HRM Operations Branch,
NMPC
N-62F
Washington, DC 20370

Assistant for Evaluation,
Analysis, and MIS, NMPC
N-6C
Washington, DC 20370

Spec. Asst. for Research, Experimental & Academic Programs,
NTTC (Code 016)
NAS Memphis (75)
Millington, TN 38054

Director,
Research & Analysis Div.,
NAVCRUITCOM Code 22
4015 Wilson Blvd.
Arlington, VA 22203

Technical Director
Navy Health Research Center
P.O. Box 85122
San Diego, CA 92138

Leadership Management Educat
and Training Project Offi
Naval Medical Command
Code 05C
Washington, DC 20372

Technical Director,
Navy Health Research Ctr.
P.O. Box 85122
San Diego, CA 92138

Dr. T. Niblett
The Turing Institute
36 North Hanover Street
Glasgow G1 2AD, Scotland
UNITED KINGDOM

Dr. Richard E. Nisbett
University of Michigan
Institute for Social Researc
Room 5261
Ann Arbor, MI 48109

Dr. Mary Jo Nissen
University of Minnesota
N218 Elliott Hall
Minneapolis, MN 55455

Dr. Donald A. Norman
Institute for Cognitive Scie
University of California
La Jolla, CA 92093

Director, Training Laborator
NPRDC (Code 05)
San Diego, CA 92152-6800

Director, Manpower and Perso
Laboratory,
NPRDC (Code 06)
San Diego, CA 92152-6800

Director, Human Factors
& Organizational Systems
NPRDC (Code 07)
San Diego, CA 92152-6800

Fleet Support Office,
NPRDC (Code 301)
San Diego, CA 92152-6800

Library, NPRDC
Code P201L
San Diego, CA 92152-6800

Commanding Officer,
Naval Research Laboratory
Code 2627
Washington, DC 20390

Dr. Harold F. O'Neil, Jr.
School of Education - WPH 801
Department of Educational
Psychology & Technology
University of Southern California
Los Angeles, CA 90089-0031

Dr. Stellan Ohlsson
Learning R & D Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15213

Director, Research Programs,
Office of Naval Research
800 North Quincy Street
Arlington, VA 22217-5000

Office of Naval Research,
Code 1133
800 N. Quincy Street
Arlington, VA 22217-5000

Office of Naval Research,
Code 1142
800 N. Quincy St.
Arlington, VA 22217-5000

Office of Naval Research,
Code 1142EP
800 N. Quincy Street
Arlington, VA 22217-5000

Office of Naval Research,
Code 1142PT
800 N. Quincy Street
Arlington, VA 22217-5000
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Director, Technology Programs,
Office of Naval Research
Code 12
800 North Quincy Street
Arlington, VA 22217-5000

Special Assistant for Marine
Corps Matters,
ONR Code 00MC
800 N. Quincy St.
Arlington, VA 22217-5000

Assistant for Long Range
Requirements,
CNO Executive Panel
OP 00K
2000 North Beauregard Street
Alexandria, VA 22311

Assistant for MPT Research,
Development and Studies
OP 01B7
Washington, DC 20370

Dr. Judith Orasanu
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Jesse Orlansky
Institute for Defense Analys
1801 N. Beauregard St.
Alexandria, VA 22311

Prof. Seymour Papert
20C-109
Massachusetts Institute
of Technology
Cambridge, MA 02139

CDR R. T. Parlette
Chief of Naval Operations
OP-112G
Washington, DC 20370-2000

Dr. James Paulson
Department of Psychology
Portland State University
P.O. Box 751
Portland, OR 97207

Dr. Douglas Pearse
DCIEM
Box 2000
Downsview, Ontario
CANADA

Dr. Virginia E. Pendergrass
Code 711
Naval Training Systems Center
Orlando, FL 32813-7100

Dr. Robert Penn
NPRDC
San Diego, CA 92152-6800

Dr. Nancy Pennington
University of Chicago
Graduate School of Business
1101 E. 58th St.
Chicago, IL 60637

Military Assistant for Training and
Personnel Technology,
OUSD (R & E)
Room 3D129, The Pentagon
Washington, DC 20301-3080

Dr. Ray Perez
ARI (PERI-II)
5001 Eisenhower Avenue
Alexandria, VA 2233

Dr. David N. Perkins
Educational Technology Center
337 Gutman Library
Appian Way
Cambridge, MA 02138

LCDR Frank C. Petho, MSC, USN
CNATRA Code N36, Bldg. 1
NAS
Corpus Christi, TX 78419

Administrative Sciences Department,
Naval Postgraduate School
Monterey, CA 93940

Department of Computer Science,
Naval Postgraduate School
Monterey, CA 93940

Department of Operations Research,
Naval Postgraduate School
Monterey, CA 93940

Dr. Tjeerd Plomp
Twente University of Technol
Department of Education
P.O. Box 217
7500 AE ENSCHEDE

THE NETHERLANDS

Dr. Martha Polson
Department of Psychology
Campus Box 346
University of Colorado
Boulder, CO 80309

Dr. Peter Polson
University of Colorado
Department of Psychology
Boulder, CO 80309

Dr. Steven E. Poltrock
MCC
9430 Research Blvd.
Echelon Bldg #1
Austin, TX 78759-6509

Dr. Harry E. Pople
University of Pittsburgh
Decision Systems Laboratory
1360 Scaife Hall
Pittsburgh, PA 15261

Dr. Mary C. Potter
Department of Psychology
MIT (E-10-032)
Cambridge, MA 02139

Dr. Joseph Psotka
ATTN: PERI-1C
Army Research Institute
5001 Eisenhower Ave.
Alexandria, VA 22333

Dr. Roy Rada
National Library of Medicine
Bethesda, MD 20894

Dr. Lynne Reder
Department of Psychology
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Brian Reiser
Department of Psychology
Princeton University
Princeton, NJ 08544

Dr. James A. Reggia
University of Maryland
School of Medicine
Department of Neurology
22 South Greene Street
Baltimore, MD 21201

CDR Karen Reider
Naval School of Health Sciences
National Naval Medical Center
Bldg. 141
Washington, DC 20814

Dr. Fred Reif
Physics Department
University of California
Berkeley, CA 94720

Dr. Lauren Resnick
Learning R & D Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15213

Dr. Mary S. Riley
Program in Cognitive Science
Center for Human Information
Processing
University of California
La Jolla, CA 92093

William Rizzo
Code 712
Naval Training Systems Center
Orlando, FL 32813

Dr. Linda G. Roberts
Science, Education, and
Transportation Program
Office of Technology Assessment
Congress of the United States
Washington, DC 20510

Dr. Andrew M. Rose
American Institutes
for Research
1055 Thomas Jefferson St., NW
Washington, DC 20007

Dr. William B. Rouse
Search Technology, Inc.
25-b Technology Park/Atlanta
Norcross, GA 30092

Dr. Donald Rubin
Statistics Department
Science Center, Room 608
1 Oxford Street
Harvard University
Cambridge, MA 02138

Dr. David Rumelhart
Center for Human
Information Processing
Univ. of California
La Jolla, CA 92093

Ms. Riitta Ruotsalainen
General Headquarters
Training Section
Military Psychology Office
PL 919
SF-00101 Helsinki 10, FINLAN

Dr. Michael J. Samet
Perceptronics, Inc
6271 Variel Avenue
Woodland Hills, CA 91364

Dr. Roger Schank
Yale University
Computer Science Department
P.O. Box 2158
New Haven, CT 06520

Dr. W. L. Scherlis
Dept. of Computer Science
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Mrs. Birgitte Schneidelbach
Forsvarets Center for Leders
Christianshavns Voldgade 8
1424 Kobenhavn K
DENMARK

Dr. Walter Schneider
Learning R&D Center
University of Pittsburgh
3939 O'Hara Street
Pittsburgh, PA 15260

Dr. Alan H. Schoenfeld
University of California
Department of Education
Berkeley, CA 94720

Dr. Janet Schofield
Learning R&D Center
University of Pittsburgh
Pittsburgh, PA 15260

Dr. Marc Sebrechts
Department of Psychology
Wesleyan University
Middletown, CT 06475

Dr. Judith Segal
OERI
555 New Jersey Ave., NW
Washington, DC 20208

Dr. Robert J. Seidel
US Army Research Institute
5001 Eisenhower Ave.
Alexandria, VA 22333

Dr. Ramsay W. Selden
Assessment Center
CCSSO
Suite 379
400 N. Capitol, NW
Washington, DC 20001

Dr. W. Steve Sellman
OASD(MRA&L)
2B269 The Pentagon
Washington, DC 20301

Dr. Sylvia A. S. Shafto
OERI
555 New Jersey Ave., NW
Washington, DC 20208

Dr. T. B. Sheridan
Dept. of Mechanical Engineering
MIT
Cambridge, MA 02139

Dr. Ben Shneiderman
Dept. of Computer Science
University of Maryland
College Park, MD 20742

Dr. Ted Shortliffe
Computer Science Department
Stanford University
Stanford, CA 94305

Dr. Lee Shulman
Stanford University
1040 Cathcart Way
Stanford, CA 94305

Dr. Randall Shumaker
Naval Research Laboratory
Code 7510
4555 Overlook Avenue, S.W.
Washington, DC 20375-5000

Dr. Robert S. Siegler
Carnegie-Mellon University
Department of Psychology
Schenley Park
Pittsburgh, PA 15213

Dr. Herbert A. Simon
Department of Psychology
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

LTCOL Robert Simpson
Defense Advanced Research
Projects Administration
1400 Wilson Blvd.
Arlington, VA 22209

Dr. Zita M Simutis
Instructional Technology
Systems Area
ARI
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. H. Wallace Sinaiko
Manpower Research
and Advisory Services
Smithsonian Institution
801 North Pitt Street
Alexandria, VA 22314

Dr. Derek Sleeman
Stanford University
School of Education
Stanford, CA 94305

Dr. Charles F. Smith
North Carolina State Univers
Department of Statistics
Raleigh, NC 27695-8703

Dr. Edward E. Smith
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. Linda B. Smith
Department of Psychology
Indiana University
Bloomington, IN 47405

Dr. Alfred F. Smode
Senior Scientist
Code 07A
Naval Training Systems Center
Orlando, FL 32813

Dr. Richard E. Snow
Department of Psychology
Stanford University
Stanford, CA 94306

Dr. Elliot Soloway
Yale University
Computer Science Department
P.O. Box 2158
New Haven, CT 06520

Dr. Richard Sorensen
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Kathryn T. Spoehr
Brown University
Department of Psychology
Providence, RI 02912

James J. Staszewski
Research Associate
Carnegie-Mellon University
Department of Psychology
Schenley Park
Pittsburgh, PA 15213

Dr. Marian Stearns
SRI International
333 Ravenswood Ave.
Room B-S324
Menlo Park, CA 94025

Dr. Robert Sternberg
Department of Psychology
Yale University
Box 11A, Yale Station
New Haven, CT 06520

Dr. Albert Stevens
Bolt Beranek & Newman, Inc.
10 Moulton St.
Cambridge, MA 02238

Dr. Paul J. Sticha
Senior Staff Scientist
Training Research Division
HumRRO
1100 S. Washington
Alexandria, VA 22314

Dr. Thomas Sticht
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. David Stone
KAJ Software, Inc.
3420 East Shea Blvd.
Suite 161
Phoenix, AZ 85028

Cdr Michael Suman, PD 303
Naval Training Systems Cente
Code N51, Comptroller
Orlando, FL 32813

Dr. Hariharan Swaminathan
Laboratory of Psychometric a
Evaluation Research
School of Education
University of Massachusetts
Amherst, MA 01003

Mr. Brad Sympson
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. John Tangney
AFOSR/NL
Bolling AFB, DC 20332

Dr. Kikumi Tatsuoka
CERL
252 Engineering Research
Laboratory
Urbana, IL 61801

Dr. Martin M. Taylor
DCIEM
Box 2000
Downsview, Ontario
CANADA

Dr. Perry W. Thorndyke
FMC Corporation
Central Engineering Labs
1185 Coleman Avenue, Box 580
Santa Clara, CA 95052

Major Jack Thorpe
DARPA
1400 Wilson Blvd.
Arlington, VA 22209

Dr. Douglas Towne
Behavioral Technology Labs
1845 S. Elena Ave.
Redondo Beach, CA 90277

Dr. Amos Tversky
Stanford University
Dept. of Psychology
Stanford, CA 94305

Dr. James Tweeddale
Technical Director
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Paul Twohig
Army Research Institute
5001 Eisenhower Avenue
Alexandria, VA 22333

Headquarters, U. S. Marine Corps
Code MPI-20
Washington, DC 20380

Dr. Kurt Van Lehn
Department of Psychology
Carnegie-Mellon University
Schenley Park
Pittsburgh, PA 15213

Dr. Beth Warren
Bolt Beranek & Newman, Inc.
50 Moulton Street
Cambridge, MA 02138

Dr. David J. Weiss
N660 Elliott Hall
University of Minnesota
75 E. River Road
Minneapolis, MN 55455

Roger Weissinger-Baylon
Department of Administrative
Sciences
Naval Postgraduate School
Monterey, CA 93940

Dr. Donald Weitzman
MITRE
1820 Dolley Madison Blvd.
MacLean, VA 22102

Dr. Keith T. Wescourt
FMC Corporation
Central Engineering Labs
1185 Coleman Ave., Box 580
Santa Clara, CA 95052

Dr. Douglas Wetzel
Code 12
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Barbara White
Bolt Beranek & Newman, Inc.
10 Moulton Street
Cambridge, MA 02238

LCDR Cory deGroot Whitehead
Chief of Naval Operations
OP-112G1
Washington, DC 20370-2000

Dr. Michael Williams
IntelliCorp
1975 El Camino Real West
Mountain View, CA 94040-2216

Dr. Hilda Wing
Army Research Institute
5001 Eisenhower Ave.
Alexandria, VA 22333

A. E. Winterbauer
Research Associate
Electronics Division
Denver Research Institute
University Park
Denver, CO 80208-0454

Dr. Robert A. Wisher
U.S. Army Institute for the
Behavioral and Social Sciences
5001 Eisenhower Avenue
Alexandria, VA 22333

Dr. Martin F. Wiskoff
Navy Personnel R & D Center
San Diego, CA 92152-6800

Dr. Merlin C. Wittrock
Graduate School of Education
UCLA
Los Angeles, CA 90024

Mr. John H. Wolfe
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Wallace Wulfeck, III
Navy Personnel R&D Center
San Diego, CA 92152-6800

Dr. Joe Yasatuke
AFHRL/LRT
Lowry AFB, CO 80230

Dr. Masoud Yazdani
Dept. of Computer Science
University of Exeter
Exeter EX4 4QL
Devon, ENGLAND

Major Frank Yohannan, USMC
Headquarters, Marine Corps
(Code MPI-20)
Washington, DC 20380

Mr. Carl York
System Development Foundation
181 Lytton Avenue
Suite 210
Palo Alto, CA 94301

Dr. Joseph L. Young
Memory & Cognitive
Processes
National Science Foundation
Washington, DC 20550

Dr. Steven Zornetzer
Office of Naval Research
Code 1140
800 N. Quincy St.
Arlington, VA 22217-5000

Dr. Michael J. Zyda
Naval Postgraduate School
Code 52CK
Monterey, CA 93943-5100